

GEMS 1 Project Completion- overview and achievement Presentation

3rd August 2015



Overview of the Project

Key Facts	Original Contract	Amendments & Expansions
Contract signing	Contract signed 9 th of Feb 2010,. Original budget £5.997 Million	First Contract amendment came through after a long wait in the 3 rd quarter of 2012, with a new budget of £7.796M.
Inception Phase	Implementation started on 10 th March 2010. Inception phase report submitted in Nov 2010. There was a 3 months lag period from Dec-Feb 2011, waiting for the review of the inception report. Approval to start implementation given in February	<p>Initial X-GEMS logframe finalised in June 2012</p> <p>2nd Contract amendment came through in 13th December 2013 with revised logframe and increased targets With a new budget £8.790M</p> <p>3rd Contract amendment in July 2014 for reallocations across budget lines</p> <p>4th Contract Amendment in May 2015 for 1 month extension to 30th Sept 2015 With a new budget £8.880M</p> <p>5th Contract amendment in July 2015 for reallocation across budget lines</p>

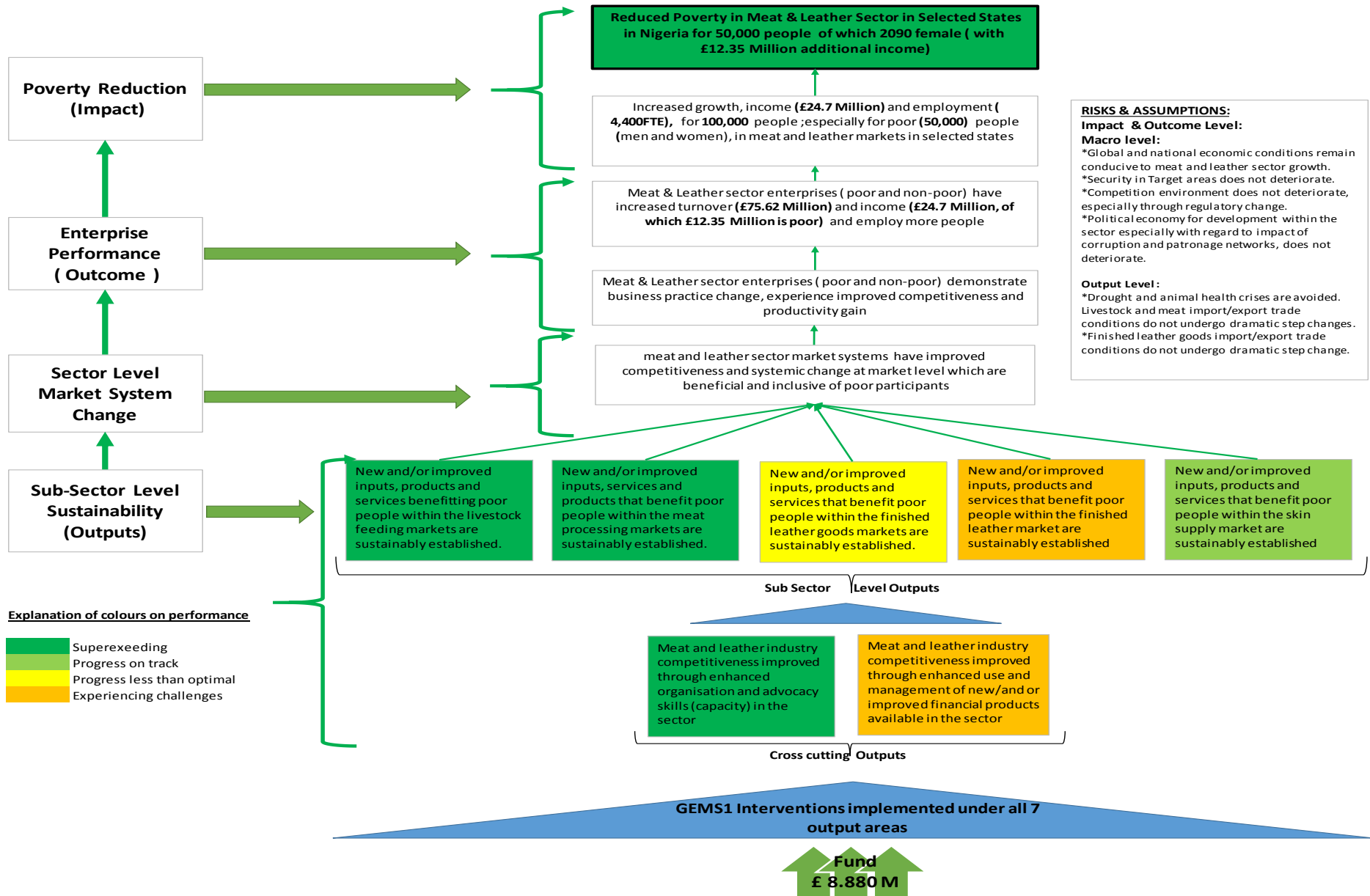
Overview of the Project

Key Facts	Original Contract	Amendments & Expansions
Duration	Originally scheduled to end on 9 th Feb 2015	New duration to 30 th September 2015 (Contract amendment #5)
Budget	£5.997 Million	£8.880 Million (After CA#4)
States	Kano, Lagos, Kaduna	Abuja , Abia, Anambra, Jigawa, Katsina & Zamfara
Target beneficiary	30,000	100,000
Income target	£15,000,000	£ 24,700,000

Project Timeline

	2010	2011	2012	2013	2014	2015
	2015 Logframe Outputs					
Inception						
Feed Finishing						
Meat Processing						
Finished Leather Goods						Combined
Finished Leather						
Skin Quality						
BMO & Advocacy						
Access to Finance						Incorporated into Outputs
Gender, Poverty & ESRB			G&P incorporated into Impact Level	ESRB incorporated into MP & FL		

GEMS1-Support to Meat & Leather Program Level Theory of Change



Key Strategic Changes in Project lifetime

Inception Phase

Key Decisions	Strategic Consequence
Move from a cluster oriented/challenge fund program to an M4P/ value chain program	This made it imperative that the project be managed by an M4P experienced team leader.
Shift from SWG to trade based BMOs as representative of large MSME population and decision to leverage Federal govt. support on meat and leather.	5 sub-sectors identified for implementation-Feed Finishing, Meat processing, Finished Leather Goods, Finished Leather, and Skin Quality
Separated Meat and Leather value chains as independent value chains	BMO development and advocacy identified as cross-cutting issue

Key Strategic Changes in Project lifetime (Cont.)

1st Year of Implementation -2011

<ul style="list-style-type: none">• An M4P experienced team Leader on board (3rd Quarter 11)	<ul style="list-style-type: none">• Expansion of work in Abuja and Aba, Abia State due to sector representation and strategic orientation to not focus on large scale tanneries
<ul style="list-style-type: none">• X-GEMS workshop organized to develop the first draft layout of GEMS1 (m4p compliant) logframe	<ul style="list-style-type: none">• Initial focus on FLG and exploring other work in other meat sub sectors
<ul style="list-style-type: none">• A team was expanded with intervention managers in FLG (Al-Habib), and RM experienced in DCED brought on board	<ul style="list-style-type: none">• Focusing on smaller enterprises in FLG
<ul style="list-style-type: none">• A DCED oriented results measurement designed and implemented	<ul style="list-style-type: none">• FF activities initiated in the 3rd Quarter
<ul style="list-style-type: none">• Scaled back on work with public sector abattoir and shifted focus to privately owned abattoirs prepared to invest	<ul style="list-style-type: none">• Advocacy work focused on negative impact of EEG, problem with cheap Chinese imports and access to finance for BMOs

Key Strategic Changes in Project lifetime (Cont.)

2nd Year of implementation 2012

- Increased focus on farm families in feed finishing. More private sector oriented approach involving feed companies
- Independent M&E review mission and revision of measurement principles and definitions
- Revision of logframe indicators in terms of gender and poverty
- Extensive linkage activities in Kano, Kaduna, Abuja, Aba – detailed work with brand owners and designers in Lagos and Abuja.
- Initiated work in Onitsha, Anambra State for FLG (especially inputs supply) –
- Extensive work on the under-bridge market and advocacy with LASG to prevent its destabilising relocation
- Strong focus on establishment of a National Association for SMEs in the Leather Industry involving regional umbrella organisations

3rd Year of implementation 2013

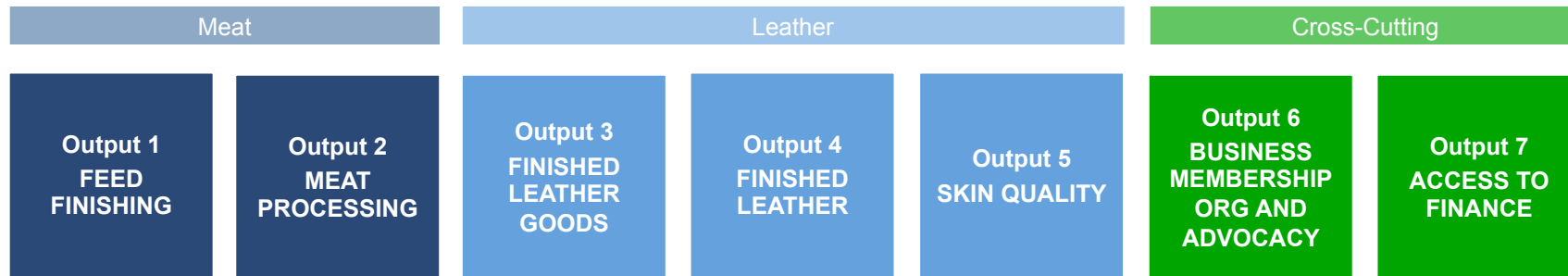
- Decision to scale back FF activities in conflict affected areas in Kaduna and heavy focus on Kano State (inc. peri-urban area)
- Logframe reporting on people benefitted as opposed enterprises since March 2013
- Internal Strategic review to develop expansion strategies for CA #2 (two amendments submitted in May and October)
- Inclusion of access to finance as a separate cross cutting Output
- Revision of logframe target, an increase of some targets by 300% as part of CA#2
- Strategies revision of skin quality Output – decision to recruit IM FL/FLG
- Inclusion of commercial feedlot activities to complement Meat Processing
- Environmental issues removed as Output and included under Meat Processing and Finished Leather

4th Year of implementation 2014

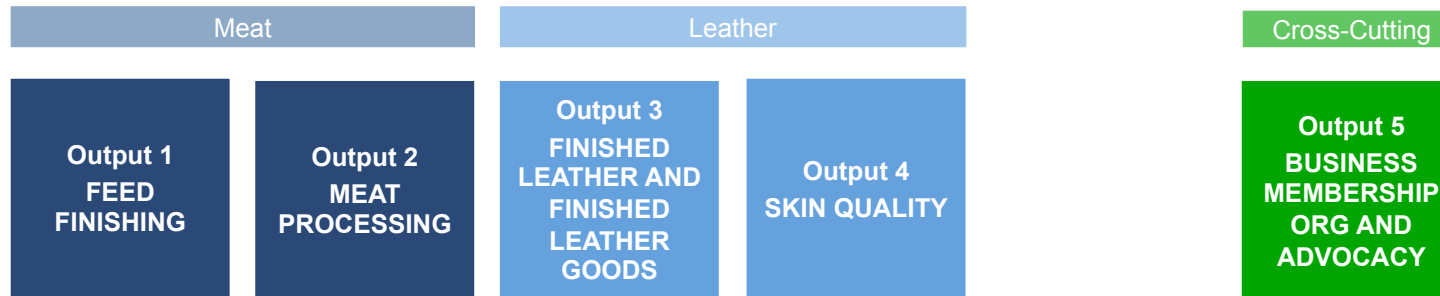
- Expansion of pilots into full scale gender oriented projects – women's groups in FLG (Kano, Aba), Female workers in abattoirs (Abuja - Karu, Lagos – ‘Pomo Women’)
- Large staff recruitment, expansion of Feed Finishing into new States – Katsina, Jigawa, Zamfara, each with a dedicated BDO
- Additional staff including full time IM (FLG) for Aba, BDO FL and FLG in Kano, BDOs on BMO development and Access to Finance
- Full time position of Results Measurement Officer and considerable work in RM in preparation and participation in full DCED audit
- Decision to cease work activities in Onitsha, and scale back on ambitions for National Association – stronger focus on regional associations. Frustration with Lagos FLG cluster refusal to accept State offer
- Mid Term Review

GEMS1 Intervention Areas – Final Logframe

Original Logframe



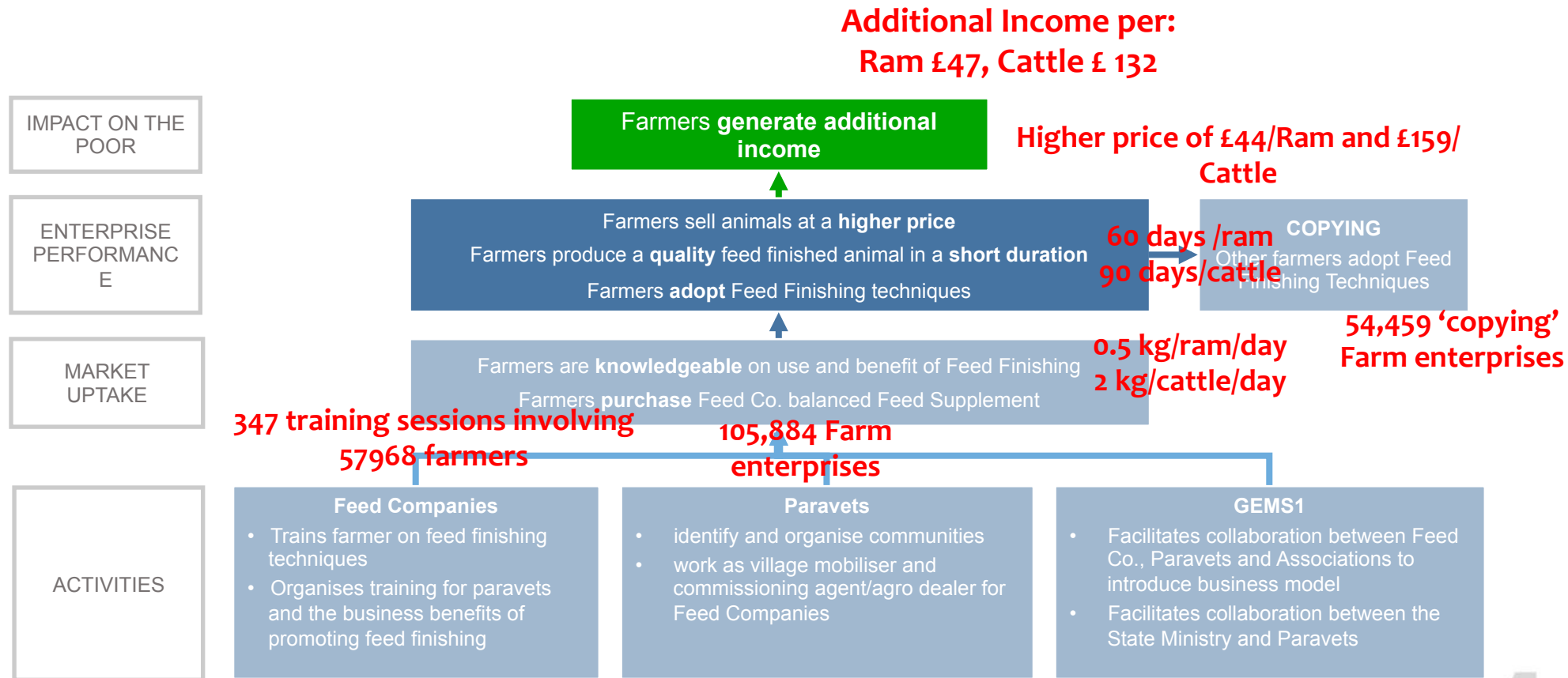
Restructured Logframe



GEMS1 | SUPPORT to MEAT and LEATHER INDUSTRY

Key Strategic Outputs and successful Intervention Models

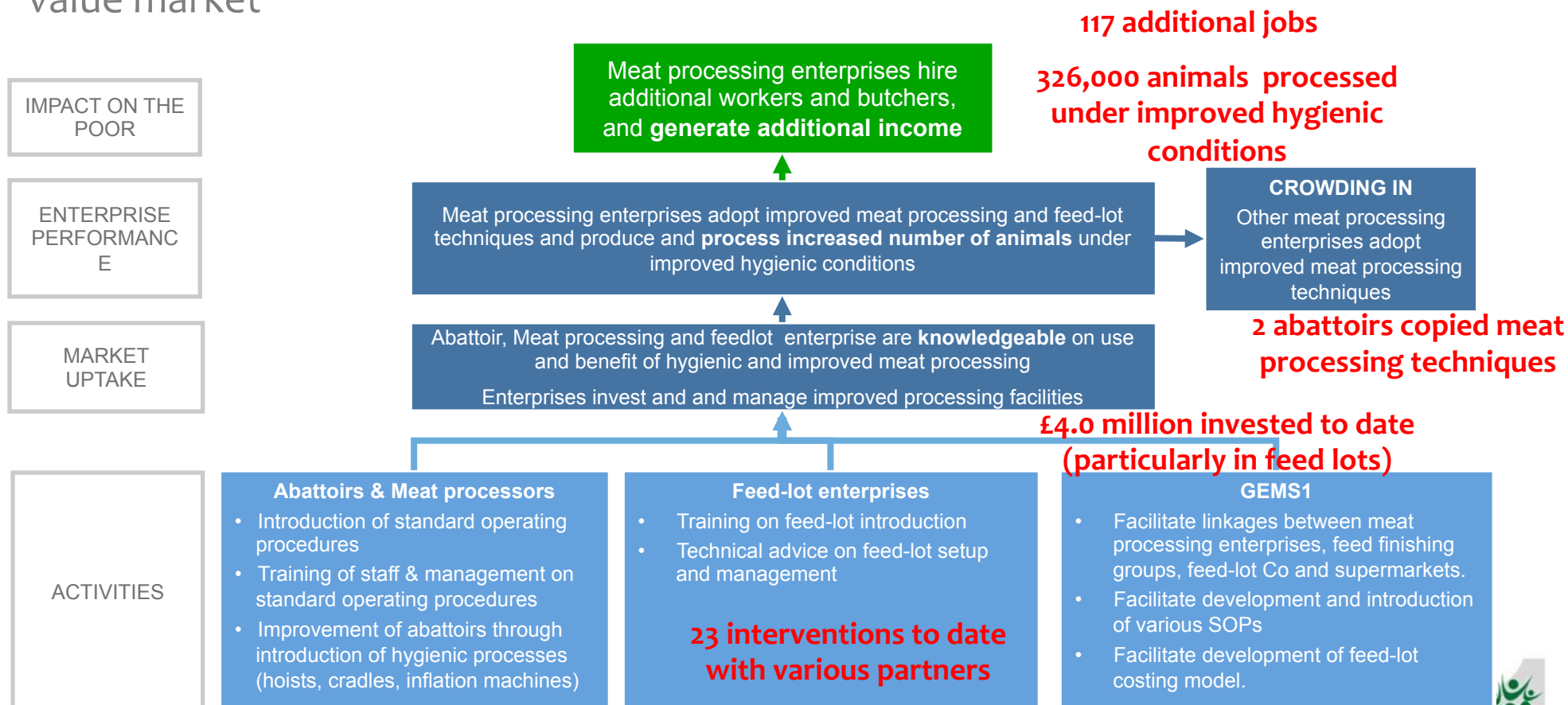
Feed Finishing - Improving animal meat productivity (carcass weight/time)



GEMS1 | SUPPORT to MEAT and LEATHER INDUSTRY

Key Strategic Outputs and successful Intervention Models

Meat Processing - Increasing volume of meat processed through hygienic meat processing unit & Supply of quality meat (processed hygienically) to high value market



Key Strategic Outputs and successful Intervention Models

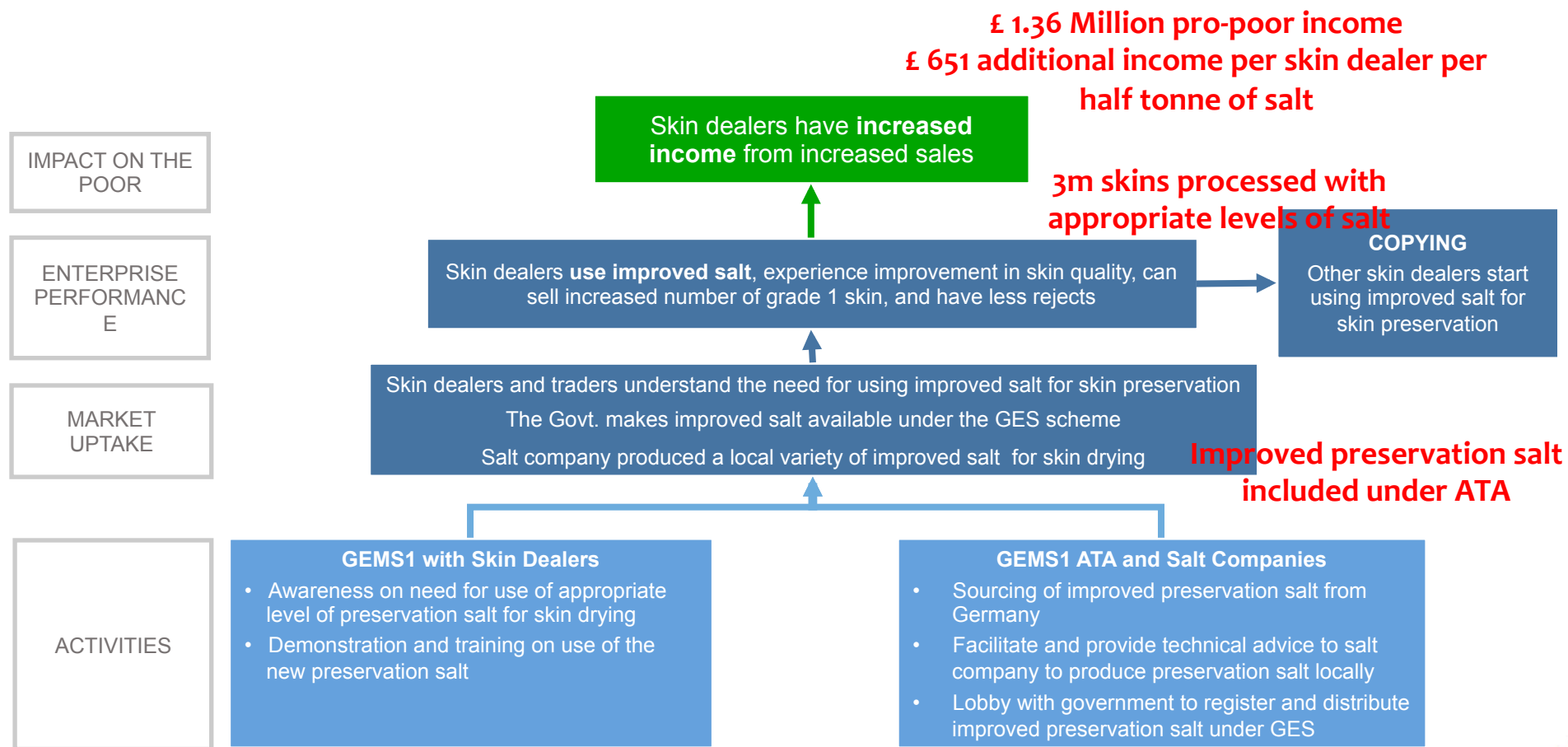
Finished Leather Goods

1. Access to input, including leather
2. Access to tools and equipment's to improve quality and quantity of FLG
3. Access to finance
4. Skill acquisition and training
5. Linkages and coordination of activities for increased business relationships
6. Branding and packaging to promote 'handcrafted in Nigeria'.
7. Policy, advocacy and information sharing to facilitate the development of viable BMOs for advocacy purposes.

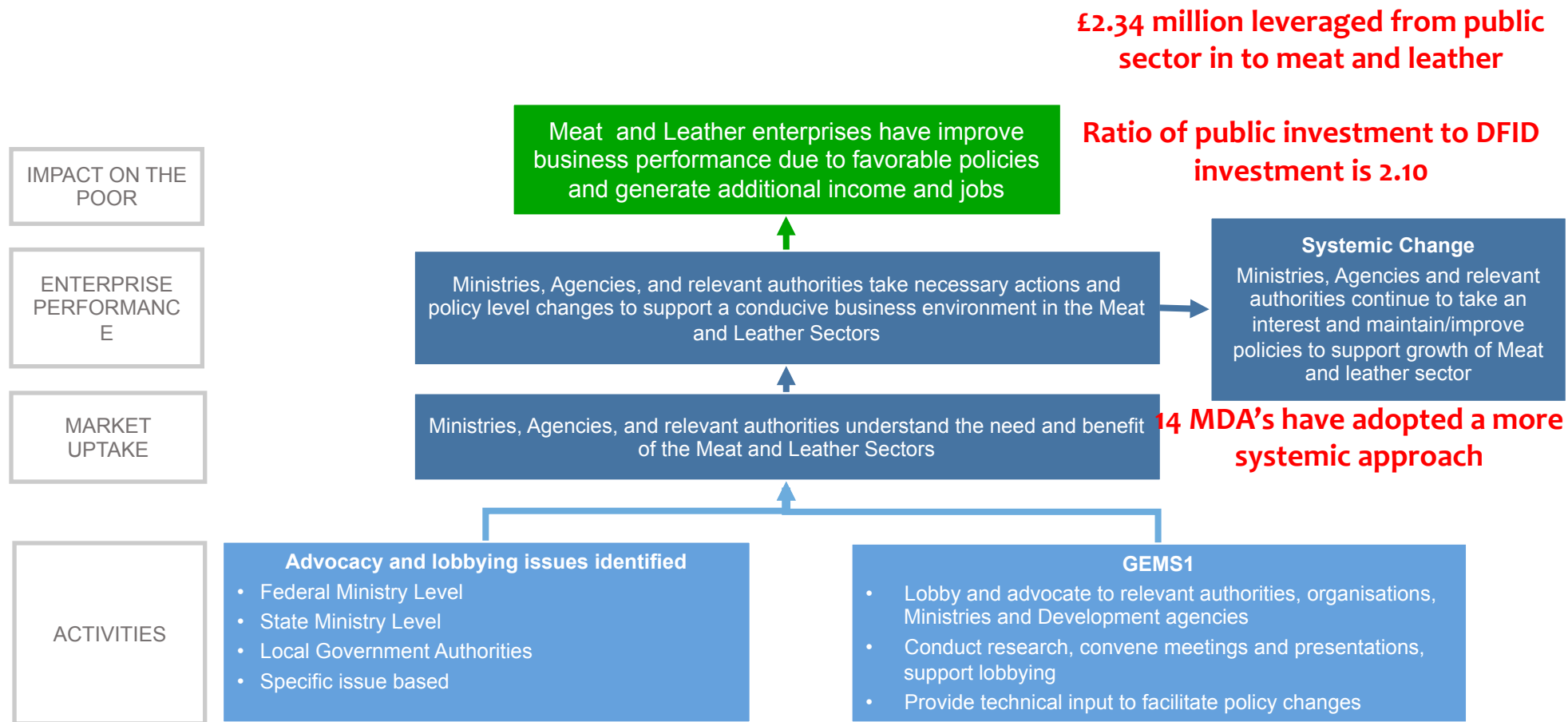


Successful Intervention Models

Skin Quality - Improved quality of skin through appropriate use of input & tools



BMO Development - Creating advocacy platforms to leverage public sector resources



For addressing “threat” to the industry (EEG, cheap Chinese imports)
Create better sector communication & coordination

Progress Update-Results



Achievement of Impact

Indicators: Final Project Targets for end of June 2015 (as per New Logframe)	Cumulative Achievements by end of April 2015 (actual results measured).	Achievements against Final project Targets - June 2015 (using RAG traffic lights)
100,000 People (inc. poor men and women) recording positive change in incomes (M/F) by end of June 2015.	Approximately 237,200 people (inc. poor men and women) recording positive changes in income.	Already exceeded the project end target for June 2015. Currently at 223% achievement that target
Indicators: Project Completion Targets - end of June 2015 (as per Final GEMS1 Logframe – Submitted Feb 2015)	Cumulative Achievements as at Project Completion – end of June 2015 (actual results measured).	Achievements against Project Completion Targets - June 2015 (using RAG traffic lights)
100,000 People (inc. poor men and women) recording positive change in incomes (M/F) by end of June 2015.	Approximately 237,200 people (inc. poor men and women) recording positive changes in income.	Achieved more than double (237%) the Project Completion Target.
50,000 poor men and women recording positive change in incomes by end of June 2015	Approximately 124,650 poor men and women (inc. poor workers) are recording positive change in income	Achieved more than double (249%) the Project Completion Target.
2,090 poor women recording positive change in incomes by end of June 2015.	19,490 poor women recording positive change in incomes has been achieved	Already massively exceeded the Project Completion Target (by 8½times).
Total (cumulative) additional change (increase) in net income for Indicator 1 (M/F).of £24.7 million by end of June2015.	Estimated cumulative additional income change amounts to £ 42.0 Million for all interventions	Already exceeded the Project Completion Target. (achieved 170% of target)
35% of income improvement in Indicator 2 for the benefit of the poor (M/F) of £8.6 million by the end of June 2015	An estimated £17.33 million income benefit has been created for the poor	Achieved double (201%) of the Project Completion Target. The pro-poor income represents 41% of the total income generated
4,400 FTE employment (M/F) created by end of June 2015	Approximately 4,076 FTE employment create	With recently measured jobs created via apprenticeships the Project Completion Target has almost been exceeded (achieving 93% of target).

Achievement of Outcome

Indicators: Project Completion Targets - end of June 2015 (as per Final GEMS1 Logframe – Submitted Feb 2015)	Cumulative Achievements as at Project Completion – end of June 2015 (actual results measured).	Achievements as at April 2015 Project Completion Targets - June 2015 (using RAG traffic lights)
33,000 enterprises/ farms/ businesses that demonstrate improved business performance (additional turnover and / or productivity) by end of June 2015	116,417 enterprises are demonstrating improved business performance in meat and leather industry	Achieved more than treble (352%) the Project Completion Target.
£75.6 million additional turnover of enterprises in the meat and leather sector by end of June 2015	£123.4 million (cumulative) additional turnover of enterprises in the meat and leather sector achieved	Already exceeded the Project Completion Target. (achieved 162% of target)
50% of new or improved products and services, introduced through project facilitation, that are established in the market 12 months after project support has ended by June 2015	50% of the products /services or introduced through project facilitation are sustained.	Already achieved the Project Completion Target
50% of new or improved regulations or reforms, introduced through project facilitation, that are established in the market 12 months after project support has ended by June 2015	50% of the products /services or regulations introduced through project facilitation are sustained.	Already achieved the Project Completion Target
Overall Output assessment	GEMS1 has achieved and surpassed all Project Completion Targets – Average achievement for all 4 Indicators, as at June 2015, is 178%	
Readiness to achieve Final Project Target for end of June 2015		GEMS1 has already achieved all its project end targets for June for all the Outcome indicators.

Output 1 Indicators

Indicators: Project Completion Targets - end of June 2015 (as per Final GEMS1 Logframe – submitted Feb 2015)	Cumulative Achievements as at Project Completion - end of June 2015 (actual results measured).	Achievements against Project Completion Targets - June 2015 (using RAG traffic lights)
83,160 livestock (cattle/sheep/ goats) being fed in target enterprises by end of June 2015	540,086 livestock being fed in target enterprises. 89,440 cattle, 450,646 sheep/goats	Substantially exceeded targets. 649% of the Project Completion Target
20,790 livestock feeding enterprises that apply and benefit from improved levels of knowledge, skill and use of inputs and services by June 2015	105,884 livestock feeding sector enterprises have benefitted from improved level of knowledge and skills on feed finishing	Substantially exceeded targets Achieved almost five times (509% achieved) the Project Completion Target.
300 service providers (SPs) that offer/ benefit from offering new and/or better inputs and support services to the livestock feeding sector by June 2015	An estimated number of 326 service providers and 7 companies have benefitted from offering new and/or improved services	Achieved and slightly exceeded the Project Completion Report. (Achieved 108%)
Overall Output assessment		GEMS1 has achieved more than 100% in all its Output 1 indicators

Output 2 Indicators

Indicators: Project Completion Targets End of June 2015 Logframe approved Feb 2015	Cumulative Achievements as at Project Completion End of June 2015 Actual Results Measured	Achievements against Project Completion Targets End of June 2015
1. 127,820 livestock processed under improved compliance with food safety and hygiene standards in target enterprises by end of June 2015	326,000 livestock have been processed under improved compliance with food safety and hygiene standards	Substantially exceeded targets. Over double (225%) the Project Completion Target.
1. 12 enterprises in meat processing sector that apply and benefit from improved levels of knowledge and skill and/or use improved inputs and services by the end of June 2015.	12 enterprises in meat processing sector are applying and benefitting from improved levels of knowledge and skill and/or use.	Achieved. 100% of the Project Completion Target.
1. £2.1 Million private sector investment leveraged into the meat processing sector	£4.0 Million has already been invested by various private sector meat processing enterprises to improve the meat hygiene and meat processing techniques	Substantially exceeded targets. 191% of the Project Completion Target. Investment continues to grow as many properties are still completing improvements.
1. 7 meat processing enterprises that adopt improved processes and operational procedures in a way that significant reduces environmental hazard and / or both public and worker health and safety issues by end of June 2015	7 meat processing enterprises have adopted improved processes and operational procedures in a way that significant reduces environmental hazard and / or both public and worker health and safety issues	Achieved. 100% of the Project Completion Target.
Overall Output assessment	GEMS1 has achieved and surpassed all Project Completion Targets. The average achievement for all 4 Indicators, as at June 2015, is 151%	

Output 3 Indicators

Indicators: Project Completion Targets End of June 2015 Logframe approved Feb 2015	Cumulative Achievements as at Project Completion End of June 2015 Actual Results Measured	Achievements against Project Completion Targets (Using RAG Traffic Lights) End of June 2015
An increase in the production value of finished leather goods in target enterprises of £6 Million by the end of June 2015	An increase in production value of finished leather goods £6.9 million	Already achieved Project Completion Target (115% Achieved as at June 2015). With the expanded use of sole press machines in both clusters, and with N 17.28m in BoA loans already disbursed these results will continue to grow.
8,580 enterprises in the finished leather goods sector that apply and benefit from improved levels of knowledge and skill and/or use improved inputs and services by the end of June 2015	Approximately 8200 enterprises in the FLG sector are applying and benefitting from improved levels of knowledge and skill and/or using improved inputs and services	In total GEMS1 data suggest that GEMS1 has benefitted approximately 9500 FLG enterprises However, GEMS1 has conducted proper overlap adjustment and individual LEMPAAS members been benefitting in multiple ways. The overlap adjusted figure suggests that GEMS1 is currently at 96% % achievement of the Project Completion Target.
Increased production of finished leather skins/hides in target enterprises of 2.75 million units by end of June 2015	2.3 million additional finished leather skin/hides have been produced. <i>3.2 million better quality skin available for conversion to improved finished leather</i>	Considering the skin quality interventions realised, GEMS1 has achieved the Project Completion Target (and leather contributes specifically to 83% of the project end target achievement).
275 enterprises in the finished leather sector that apply and benefit from improved levels of knowledge and skill and/or use improved inputs and services by end of June 2015	387 finished leather enterprises (which include small industrial tanners, skin buyers, skin dyers and processors), and new youth leather entrepreneurs who are benefitting via the youth empowerment Program.	Already achieved the Project Completion Target (140% achievement).
92 of targeted small and medium sized tanneries that adopt improved processes and operational procedures in a way that significantly reduces environmental hazard and / or both public and worker health and safety issues.	300 targeted small and medium enterprises have adopted an improved waste management system, where carts are used on a regular basis to clean up the waste products at the artisanal tannery (previously kept in their premises)	Achieved more than treble (325%) the Project Completion Target.
176 service providers that offer and benefit from offering new and/or better inputs and support services to finished leather goods and finished leather sector by the end of June 2015	143 service providers and BMOs offering and benefitting from offering new and/or better inputs and support services.	Currently at only 80% achievement of the June 2015 target.
Overall Output Assessment		Using a weighted average approach where each indicator is assigned equal importance (then, 1/6th of % achievement is taken from each indicator and added together) this shows that GEMS1 is currently at 140% achievement.

Output 4 Indicators

Indicators: Project Completion Targets - end of June 2015 (as per Final GEMS1 Logframe – submitted Feb 2015)	Cumulative Achievements as at Project Completion - end of June 2015 (actual results measured).	Achievements against Project Completion Targets - June 2015 (using RAG traffic lights)
1,850,000 improved skins supplied to target tanneries by end of June 2015	Approximately 3,200,000 improved skins have been produced and supplied to the tanneries	Exceeded Project Completion Target (173% achievement).
3,300 Enterprises in the skin supply sector that apply and benefit from improved levels of knowledge and skill and/or use improved inputs and services by end of June 2015	2,650 Enterprises in the skin supply sector that apply and benefit from improved levels of knowledge and use of salt	Currently at 80% achievement of the June 2015 target However, with a planned distribution of preservation salt to 6000 skin dealers under GES and growing commercial commitment from Dangote Chemicals to market improved preservation salt it is very likely that GEMS1 will be able to confirm the figure with proper attribution that exceeds the June 2015 target by the end of the Programme.
150 service providers that offer and benefit from offering new and/or better inputs and support services to the skin supply sector by end of June 15	<p>In the initial salt distribution it is estimated that there were 20 major service providers - National and state level distributors and that each of these directly used 4 to 5 local sub-agents to deliver and train skin amalgamators and skin buyers in the use of the improved salt. Currently a total of ±68 service providers.</p> <p>In the planned distribution of GES and commercial sales it is estimated that at least 86 national and state level major distributors will be required. If the same ratio of agents to main distributors is achieved (4.5 to 1) the overall SP target will be easily exceeded by 2½ times. This involvement of distributors and agents interacting with skin buyers and amalgamators will continue to be subject to monitoring and research by GEMS1.</p>	<p>It is clear that with a commercial loan from Jaiz Bank, the market value chain will rapidly increase the number of service providers easily achieving the end of project target by the time of the major distribution for Sallah in September. Equally, it is possible that if the distribution under GES actually goes ahead the target will be substantially exceed.</p> <p>Although difficult to full identify how the SPs and recipients have benefitted from the distribution - the involvement of the SPs will be easily confirmed before the end of the project. In September.</p>
Overall Output assessment		Simple weighted average 99% achievement. Results are expected to increase in the coming two years.

Output 5 Indicators

Indicators: Final Project Targets for end of June 2015 (as per New Logframe)	Cumulative Achievements as at Project Completion – End of June 2015 (actual results measured).	Achievements against project completion Targets – End of June 2015 (using RAG traffic lights)
16 collective advocacy initiatives undertaken by end of June 2015.	At least 16 advocacies issues undertaken .	100% achievement of June 2015 target.
25,000 enterprises in meat and leather sector organized in BMOs by the end of June 15	30,500 enterprises in the leather sector currently organized in a BMO	122% achievement of the June 2015 target.
20 Number of BMOs with better association management and lobbying capacity	32 associations of various types (national, state level, regional, local govt. level, zonal, market line based and/or issue based have been capacitated by GEMS1, and are currently active with better association management and lobbying capacity	160% achievement of the project completion target .
£2.16 Million public sector investment leveraged into meat & leather sector	To date £ 2.34 Million public sector investment has been made by various MDAs to meat and leather sector	Achieved 109% of the project completion target
14 institutions (MDAs, BMOs and projects) implementing improved practices aligned with systemic economic development by the end of June 2015	Fourteen (14) Institutions (MDA, BMOs and projects) are implmenting improved practices aligned with systemic economic development. (see below in update on progress).	Achieved 100% of the Project completion target
Overall Output assessment		Already achieved 100% or more for all indicators
Readiness to achieve Final Project Target for end of June 2015		The output has already achieved and surpassed the final project target for end of June 2015. Average achievement for all 4 indicators as at June 2015 is 114%

Systemic change

There is evidence of sustainability and market deepening

	'ADOPTION' Partners recognise viable business models	COPYING Independent behaviour change by consumers	'ADAPTATION' Partner innovation and independent investment	'EXPANSION' Crowding in	'RESPONSE' FROM GOVERNMENT Support to market system or enterprises	'RESPONSE' BY INTERCONNECTED MARKETS New services, practices
Output 1 FEED FINISHING	✓	✓ 1 facilitated:1 copying enterprise	✓ Investment in marketing	✓ 20+ firms producing small ruminant feed (from zero)	✓ GES, Paravets, Agri school curricula, budget allocation ATA	✓ Financing model BoA, New livestock feed manufacturers' assoc
Output 2 MEAT PROCESSING	✓	✓ Emerging retail market for quality meat	✓ Investment in feed lots and abattoirs	✓ 2 improved abattoirs without GEMS1 facilitation	✓ Our focus, working with State ministries	
Output 3 FINISHED LEATHER AND FLG	Few viable business models (except trade fair)	✓ Additional trade fairs	✓ Investments in Sole press machines and CFC	✓ 2 CFCs and skills training of youth by MDAs	✗ Challenge of EEG	✓ New financing models Stronger Associations
Output 4 SKIN QUALITY	✓ Industrial Salt	Too early to measure	✓ Dangote skin preservation salt launched	Too early to measure	✓ Inclusion in GES	✓ Jaiz bank loan product

GEMS1 | SUPPORT to MEAT and LEATHER INDUSTRY

Signs of Systemic Change & Sustainability

Feed Finishing

- Feed manufacturing companies are copying; 19 companies marketing ruminant feeds
- Increasing volume of ruminant feed sales
- Feed Manufacturers are investing
- Livestock feeds market competition commenced
- Demand at farmer level for awareness and training
- Farmers establishing copying
- Public sector recognition
- Lagos State Meat Authority established
- Skills and capacity of participating farmers improved
- Feed finishing included in agricultural education system



Signs of Systemic Change & Sustainability

Meat Processing

- Meat processing adopting improvement recommendations
- Booth slaughtering accepted by the National Butchers Association
- Lagos State has embraced PPP and Lagos State Meat Authority.
- Formal processing businesses increase quality meat supply
- Meat retail outlets have adopted modern retailing models
- Formal feedlotting has been established as a business activity

Leather

- Leather sector included in ATA/GES strategies
- EEG has been suspended. Decision already taken for World Bank and DFID to take up this issue with FGN.

Skin Quality

- Domestic manufacture of preservation salt (Dangote)
- Establishment of distribution chain



Signs of Systemic Change & Sustainability

Business Membership Organisations & Advocacy

- Feed finishing, skin trading and leather sector embedded in public sector
- Formation and governance of improvement in BMOs
- Jobs preserved in ponmo production. Involvement in the Pomo Womens project clearly showing viability of support services like transport.
- Advocacy initiatives achieved systemic change:
 - Inclusion of value chains in ATA/GES
 - Improved understanding of the market distortion impact of the EEG
 - Support for access to finance

Access to Finance

- BOA, GRMFB & Jaiz Bank have established relevant finance products



In Conclusion...

